



IMPLEMENT SIGNED MEANS TEST STRATEGY (ROSSIO 24)

USER MANUAL

Patch EAS*1*4

November 2001

Last updated 11/28/01

Department of Veterans Affairs
VISTA System Design & Development

Revision History

Revision Date	Brief Description	Author
	•	
	•	

Table of Contents

REVISION HISTORY	I
INTRODUCTION.....	1
OVERVIEW	1
FUNCTIONALITY.....	1
ACCESS TO DOCUMENTATION.....	1
USING THE SOFTWARE.....	2
MEANS TEST SIGNATURE REPORTS	2
<i>Means Test Signature Summary Report.....</i>	<i>3</i>
<i>Means Test Signature Detailed Report.....</i>	<i>4</i>
GLOSSARY.....	5
ACRONYMS	5
APPENDIX A – MEANS TEST SIGNATURE SUMMARY REPORT.....	6
APPENDIX B – MEANS TEST SIGNATURE DETAILED REPORT	7
INDEX.....	8

Introduction

Overview

Internal Revenue Service (IRS) regulations require that the Health Eligibility Center (HEC) ensure that they have a signed means test (MT) on file before performing income verification matching against IRS data. The issue of a signed means test was also addressed in Item 24 of the Rossio Report. In response, the HEC has implemented a process in which the VAMCs send them an electronic copy of the signed means test. The HEC then indexes the means test image and tracks whether or not the imaged signature is present and signed by the veteran with acceptable clarity. The HEC purchased an imaging system from Document Storage Systems, Inc. (DSS) for this indexing and storing, as well as for storing the signature indicator.

The “Implement Signed Means Test Strategy (Rossio 24)” project includes the capture, HEC storage, transmission and Veterans Information System & Technology Architecture (**VISTA**) storage of the HEC staff’s assessment of the presence and validity of the means test’s signature, as well as including audit reports of site compliance. The work process associated with managing the means test signature is new to both the HEC and the Veterans Affairs Medical Centers (VAMCs).

Functionality

Patch EAS*1*4 will provide authorized users with the ability to generate new reports to detail Means Test signature statistics.

Access to Documentation

You can download the Implement Signed Means Test Strategy **VISTA** documentation as follows:

From the Anonymous Directory

1. Go to the anonymous.software directory.
2. Ftp the files listed in the following table. Remember to use binary format.

File Name	Documentation Component
EAS_1_P4_UM.pdf	Implement Signed Means Test Strategy User Manual

From the Project Notebook Web Page

<http://tspr.vista.med.va.gov/warboard/anotbk.asp?proj=519>

Using the Software

Means Test Signature Reports

Before you start, please note:

- ❖ You must have the DG SUPERVISOR security key to use this option!

Means Test Signature Reports is a new option under the PIMS ADT Module's Means Test Supervisor Menu. This option may be used to generate management reports containing Means Test signature statistics for your site. You may specify either of two different report formats:

- Means Test Signature Summary Report
- Means Test Signature Detailed Report

You will then be required to select an income year and a print device, after which the **VISTA** system will deliver the requested report.

The statistics generated by these reports will only include those veterans who have a Means Test with Status of A, C or Pending Adjudication as these are the only MT statuses that require obtaining a signature.

Means Test Signature Summary Report

The purpose of this report is to help VAMCs monitor the Means Test images returned to them by the HEC. The report only shows signature indicators for Means Tests that were submitted by the local site (which may, or may not, be designated as the *primary* site). It does NOT take into account that the HEC may already have a signature on file for the veteran as sent from a different, primary site.

The report may be requested for the previous income year, current income year, or next income year.

The report generated will include a count of the MT signature indicators for the local site in each of the following categories:

Yes	Means Test image signed by veteran
No	Means Test image NOT signed by veteran
Deleted	Means Test Signature Indicator deleted by direct user edit
Null	A Means Test document has not been imaged

An example of this report may be found in Appendix A of this document.

1. From the **Means Test Signature Reports** option, select **Means Test Signature Summary Report** and press <ENTER>.

```
Select Systems Manager Menu Option: Means Test Signature Reports
```

```
SSR      Means Test Signature Summary Report
SDR      Means Test Signature Detail Report
```

```
Select Means Test Signature Reports Option: SSR  Means Test
Signature Summary Report
```

2. Enter Income Year: (Selection criteria: previous income year, current income year, next income year) and press <ENTER>.

```
Please select income year:
A) Previous Income Year
B) Current Income Year
C) Next Income Year
```

3. Select print device.

```
Select Device: HOME//
```

Means Test Signature Detailed Report

The purpose of this report is to list those veterans at a particular site for which a signature still needs to be obtained. A veteran will ONLY be listed if NEITHER the local site NOR the primary site (if different) has obtained a signature. Once a signature has been obtained by EITHER the local OR primary (if different) site, the veteran will be removed from this list.

The report may be requested for the previous income year, current income year, or next income year.

The report generated will include the following information on each veteran:

- Name
- Social Security Number
- Means Test Status
- Means Test Signature Indicator

It will also give a count of the number of No, Null, and Deleted indicators, as well as the total number of veterans in the report.

An example of this report may be found in Appendix B of this document.

1. From the **Means Test Signature Reports** option, select **Means Test Signature Detailed Report** and press <ENTER>.

```
Select Systems Manager Menu Option: Means Test Signature Reports
```

```
SSR    Means Test Signature Summary Report
SDR    Means Test Signature Detail Report
```

```
Select Means Test Signature Reports Option: SDR  Means Test
Signature Detail Report
```

2. Enter Income Year: (Selection criteria: previous income year, current income year, next income year) and press <ENTER>.

```
Please select income year:
A) Previous Income Year
B) Current Income Year
C) Next Income Year
```

3. Select print device.

```
Select Device: HOME//
```

Glossary

Acronyms

Acronym	Description
DSS	Document Storage System, Inc.
GUI	Graphical User Interface
HEC	Health Eligibility Center
IRS	Internal Revenue Service
IVM	Income Verification Match
MT	Means Test
VAMC	Veterans Affairs Medical Center
VISTA	Veterans Information System & Technology Architecture

Appendix A – Means Test Signature Summary Report

Local Site MT with Signature Indicator = YES	2000
Local Site MT with Signature Indicator = NO	40
Local Site MT with Signature Indicator = DELETED	5
Local Site MT with Signature Indicator = NULL	100
Total	2145

Key for Means Test Signature Indicators:

Yes	Means Test image signed by veteran
No	Means Test image NOT signed by veteran
Deleted	Means Test Signature Indicator deleted by direct user edit*
Null	A Means Test document has not been imaged

*The MT signature indicator would be deleted by direct user edit in cases where HEC assigned a value to an image and then later discovered that they had selected the wrong veteran/site/income year combination. The value “DELETED” is used in this report to track those cases wherein the indicator was entered and then later deleted due to an error being made as noted above.

Appendix B – Means Test Signature Detailed Report

Veteran Name	SSN	MT Status	MT Sig Indicator (Primary/Local Site)
Jones, Bill	123-45-6781	A	NO
Black, Mary	123-45-6782	C	NO
Green, Joyn	123-45-6783	Pending Adjudication	DELETED
Red, Jan	123-45-6789	A	NO
Orange, Michelle	123-45-6781	C	NULL
Purple, Todd	123-45-6782	A	NULL
Yellow, Marcy	123-45-6787	C	NO

NO indicator = 4

NULL indicator = 2

DELETED indicator = 1

Count of Veterans =7

Key for Means Test Signature Indicators:

Yes	Means Test image signed by veteran
No	Means Test image NOT signed by veteran
Deleted	Means Test Signature Indicator deleted by direct user edit*
Null	A Means Test document has not been imaged

*The MT signature indicator would be deleted by direct user edit in cases where HEC assigned a value to an image and then later discovered that they had selected the wrong veteran/site/income year combination. The value “DELETED” is used in this report to track those cases wherein the indicator was entered and then later deleted due to an error being made as noted above.

Index

A

Access to Documentation	1
Acronyms	5
Appendix A – Means Test Signature Summary Report.....	6
Appendix B – Means Test Signature Detailed Report.....	7

G

Glossary	5
----------------	---

I

Index	8
Introduction.....	1

M

Means Test Signature Detailed Report	4
Means Test Signature Reports	2
Means Test Signature Summary Report	3

O

Overview.....	1
---------------	---

P

Purpose.....	1
--------------	---

R

Revision History	i
------------------------	---

T

Table of Contents.....	ii
------------------------	----

U

Using the Software.....	2
-------------------------	---